How To Registar On The Promptly Patient Portal

Step 1: Open the Promptly Portal Link from our website or the link you received via text message or email.

1. Enter your First Name, Last Name, and Date of Birth. Alternatively enter your mobile number and the first character of your last name.



2. Click Next

FOR VERIFICATION CODE		
TEXT ME AT (***) ***		
Verification Please enter the 4-digit verificat	code ion code that you will get in call.	
CONTINUE		
O EMAIL ME AT **	***	
O None of above		

- 3. A pop-up will appear. Select the method you would like to use for verification.
- 4. Enter the code and select continue.

Step 2: Promptly Dashboard



- 2. Here you can either select a photo file of your license or you may take a new picture.
- 3. Once loaded (file) or taken (photo) and you are happy with the image save the file and close the window.
- 4. Next click on the green Demographic Square.

PATIENT DEMOGRAPHIC			Fields with red bor	der are Un-Approved change * Required fields
Title	First Name *	Middle Name	Last Name *	Suffix
Select Title \checkmark				
Date Of Birth * Age *	Sex At Birth *	Marital Status	Language *	Race *
	↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	! ~	~ ~	Select Race
Referring Physician	Primary Care Physician			
COMMUNICATION				
-				
Aailing Address 1 *	Mailing Address 2	Zip Code *	City	State
County	Country			
· · · ·				
Home Phone *	Work Phone	Mobile Phone *	Email	
		!		
Name	Contact Number			
	1			

- 5. Any item with an asterisk * is required. You do not need to complete the other fields, but it will save you time once at the office.
- 6. Please do not use a fake email address. If you do not wish to provide just leave it blank.
- 7. Click Update and you will return to the Dashboard.
- 8. Next Click on the Blue Insurance Link.



- 9. If you do not have insurance, select "Self-Pay" and continue.
- 10. If you have insurance click "My Insurance" and continue.

INSURANCE ————— Medical	Back
PRIMARY	SECONDARY
Payer Name	
Policy Number	(Add Insurance
Plan Name	

- 11. Enter your Primary Insurance. If there is a pencil as above, click it and add or update the information. If there is not a pencil, click the + Add Insurance in the Primary Field.
- 12. Enter Secondary Insurance if applicable.





13. Once you have completed your insurance information. You can click on the hamburger

button $|\equiv|^{\frac{1}{2}}$ in the upper left corner of the screen for the menu.

- 14. Select either Dashboard or Consent forms. If you go to the Dashboard select the dark blue button Consent forms.
- 15. Here will be any form you need to complete. Please complete each form.
- 16. Once the forms are completed. Go back to the hamburger button and select Payments.
- 17. In payments if you have a balance or a copayment you may make a payment.

Thank you for completing your registration prior to your appointment.